User Guide

Mercury SMS

Connected Customer Communications

Version 1.7 | December 2014

Driven to Exceed | www.aprika.com.au

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Introduction

Welcome to Mercury SMS, the application that enables you to communicate with your clients via SMS directly from your Salesforce.com CRM system!

In a world where we are connected to our clients in so many ways, via so many channels it is important to streamline the growing number of systems we use to communicate. Which is why it is so great that you're able to send your SMS communications to your clients from your familiar Salesforce.com environment.

This user guide will assist you with the installation, configuration and administration of Mercury SMS. It is anticipated that you will have Mercury SMS fully configured and operational within approximately 30 minutes. However, if you require assistance, please don't hesitate to contact us on support@aprika.com.au.

What is Mercury SMS

Mercury SMS is an application that runs on the Force.com platform. It enables Salesforce.com users to communicate with their clients via SMS.

It provides Salesforce.com users with the ability to send individual SMS messages and bulk messages to Lead and Contact records. Outbound messages can be constructed ad-hoc as required or selected from a previously created template library. Field value merging is supported allowing SMS messages to be personalised 'on the fly'. Sending SMS messages via Workflow is also supported.

Mercury SMS also provides inbound messaging allowing clients to reply to a message or to opt-out of receiving further SMS communications.

How Mercury SMS works

Mercury SMS uses an API to connect Salesforce.com with MessageMedia to send individual and bulk SMS messages to Leads and Contacts held within Salesforce.com.

To use Mercury SMS, a MessageMedia account is required. A free trial account will be provided for evaluation purposes during the 14 day free trial of Mercury SMS. This can be upgraded to a live account once subscription to Mercury SMS has been completed.

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Installation

To install Mercury SMS, click the **Get It Now** link on the AppExchange.

Mercury SMS
Two-way text messaging applicaton.
Mercury SMS
2 Way SMS for Salesforce
(No Rating)
Click here to install Mercury SMS
Email
Like 0
Tweet 0
Overview
Details
Reviews
Provider
Save
Get It Now
DESCRIPTION
Mercury SMS provides 2 way text message communication, integrated directly within Salesforce.com. Send outbound messages to individuals and bulk lists. Select from a library of templates or create an ad-hoc message. Receive inbound messages.
Outbound messaging (individual & bulk, immediate & scheduled)
Inbound messaging, including auto-opt out
Create message templates, Merge field values into message
Mercury SMS is an application that runs on the Force.com platform. It enables Salesforce.com users to communicate with their clients via SMS.
It provides Salesforce.com users with the ability to send individual SMS messages and bulk messages to Lead and Contact records. Outbound messages can be constructed ad-hoc as required or selected from a previously created template library. Field value merging is supported allowing SMS messages to be personalised 'on the fly'. Sending SMS messaged via Workflow is also supported.
CONTACT INFORMATION
1300 446 133
Website
Email
SUPPORT
Email
Terms and Conditions
PACKAGE DETAILS:
Name: Mercury
Version: Summer 2013 / 1.3.0
Type: Managed Package
COMPONENTS
Custom Objects: 4
Custom Tabs: 3
Custom Applications: 1
SALESFORCE EDITIONS
Information not provided
LANGUAGES
Information not provided
INDUSTRY SOLUTIONS
Information not provided

Select whether you wish to install Mercury SMS into your Production or Sandbox environment.

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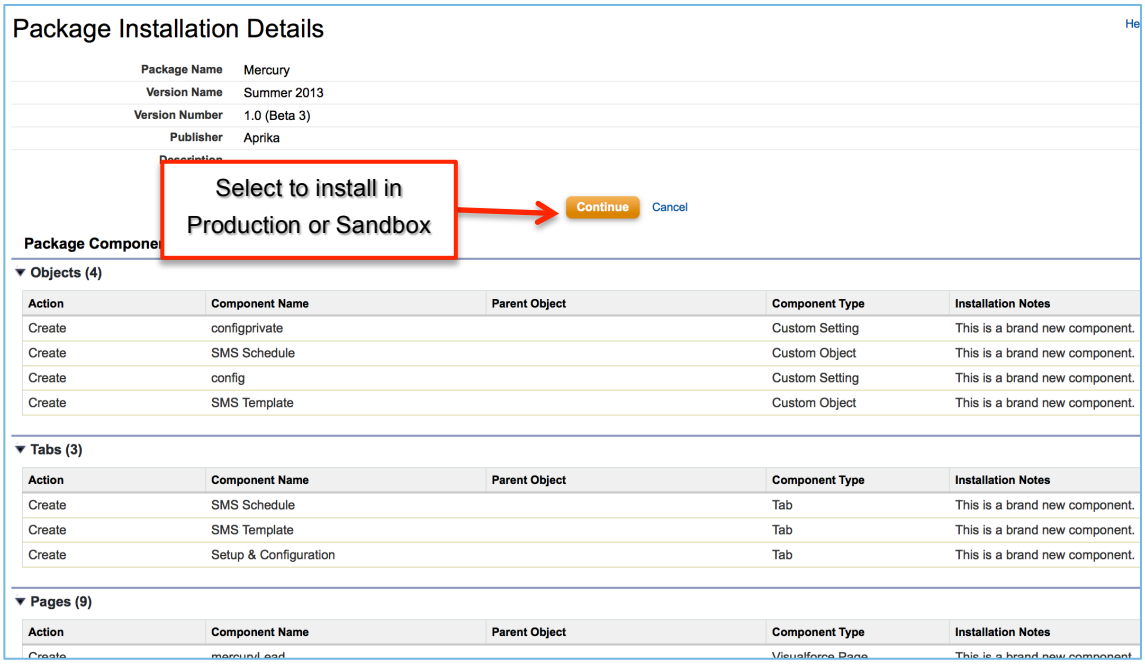
Enter your Salesforce.com User Name and Password and click Login. Accept the Terms & Conditions and click Confirm & Install.

Review the package contents and click Continue


Package Installation Details
Package Name Mercury
Version Name Summer 2013
Version Number 1.0 (Beta 3)
Publisher Aprika
Select to install in Production or Sandbox
Continue
Cancel
Objects (4)
Action | Component Name | Parent Object | Component Type | Installation Notes
Create | configprivate | | Custom Setting | This is a brand new component.
Create | SMS Schedule | | Custom Object | This is a brand new component.
Create | config | | Custom Setting | This is a brand new component.
Create | SMS Template | | Custom Object | This is a brand new component.
Tabs (3)
Action | Component Name | Parent Object | Component Type | Installation Notes
Create | SMS Schedule | | Tab | This is a brand new component.
Create | SMS Template | | Tab | This is a brand new component.
Create | Setup & Configuration | | Tab | This is a brand new component.
Pages (9)
Action | Component Name | Parent Object | Component Type | Installation Notes

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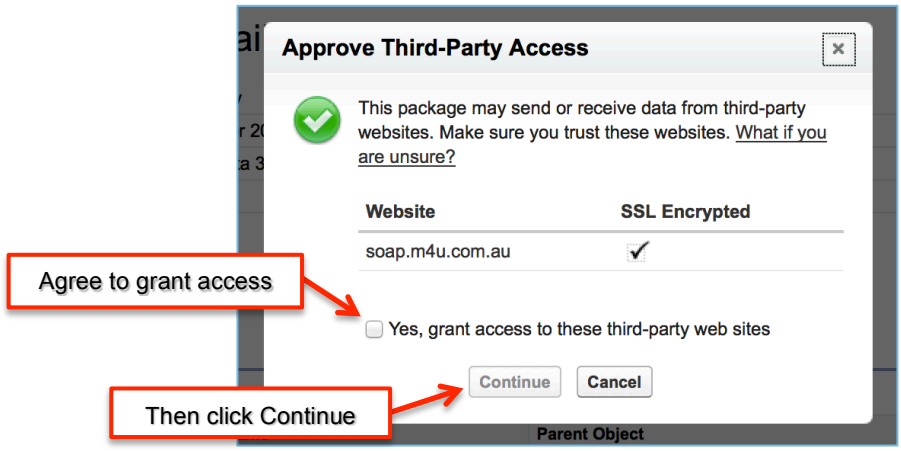
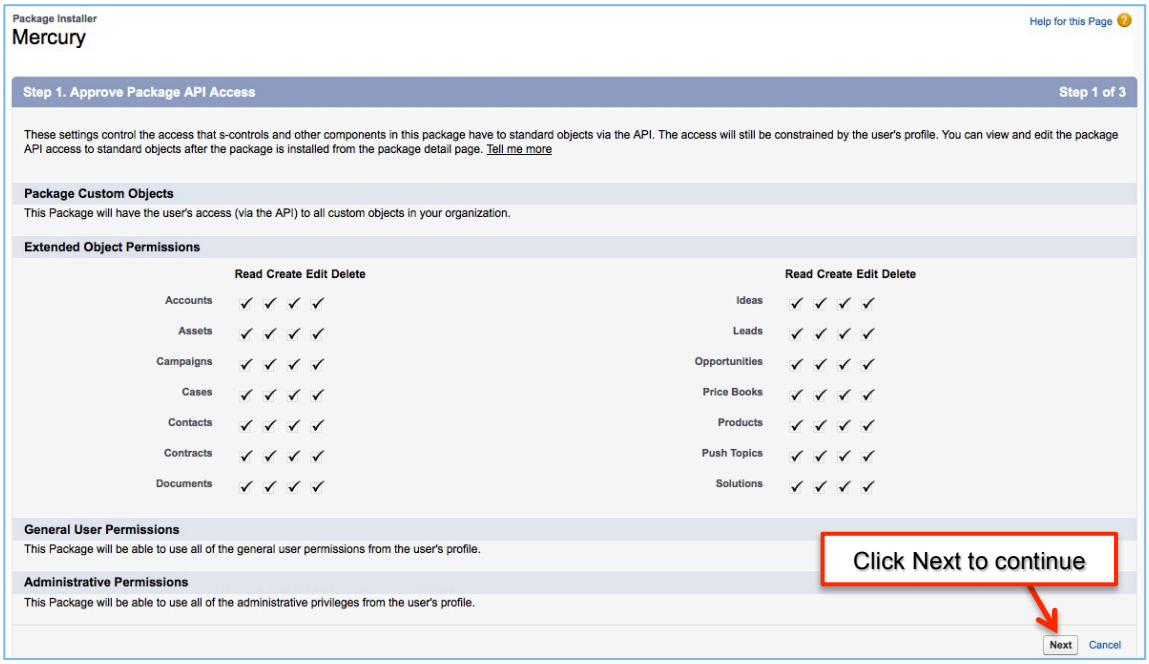
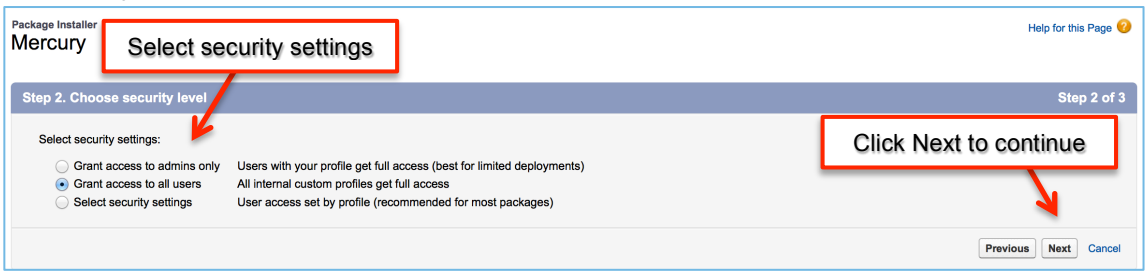
Approve the third-party access by selecting the checkbox for "Yes, grant access to these third party web sites" and clicking "Continue" (note: this is to communicate with the MessageMedia API)


Approve Third-Party Access
This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?
Website
SSL Encrypted
soap.m4u.com.au
Agree to grant access
Yes, grant access to these third-party web sites
Then click Continue
Continue
Cancel
Parent Object

Approve the package API access by clicking "Next"


Package Installer
Mercury
Help for this Page
Step 1. Approve Package API Access
Step 1 of 3
These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. Tell me more
Package Custom Objects
This Package will have the user's access (via the API) to all custom objects in your organization.
Extended Object Permissions
Read Create Edit Delete
Accounts
Assets
Campaigns
Cases
Contacts
Contracts
Documents
Ideas
Leads
Opportunities
Price Books
Products
Push Topics
Solutions
General User Permissions
This Package will be able to use all of the general user permissions from the user's profile.
Administrative Permissions
This Package will be able to use all of the administrative privileges from the user's profile.
Click Next to continue
Next
Cancel

Next, choose your security level and click "Next". (We recommend selecting to grant access to all users.)


Package Installer
Mercury
Select security settings
Help for this Page
Step 2. Choose security level
Step 2 of 3
Select security settings:
Grant access to admins only
Users with your profile get full access (best for limited deployments)
Grant access to all users
All internal custom profiles get full access
Select security settings
User access set by profile (recommended for most packages)
Click Next to continue
Previous
Next
Cancel

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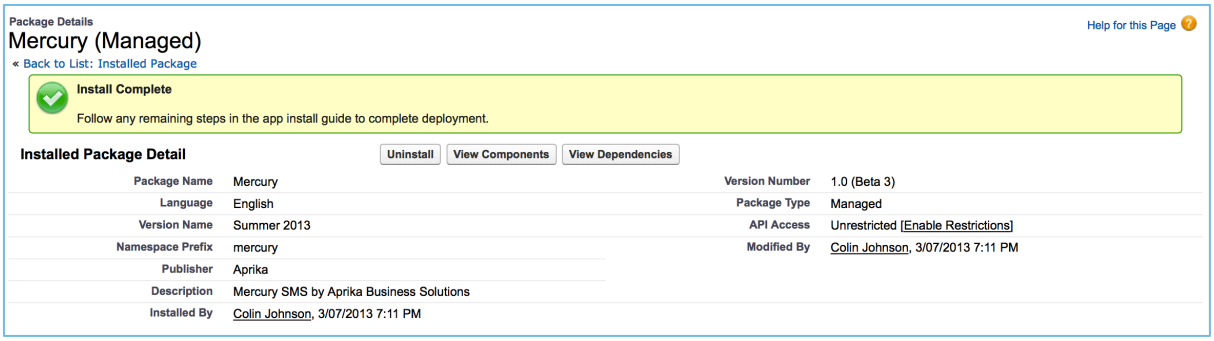
On the Install Package page, click “Install”.

You will now get a message that states your installation is complete.


Package Details
Mercury (Managed)
Help for this Page
« Back to List: Installed Package
Install Complete
Follow any remaining steps in the app install guide to complete deployment.
Installed Package Detail
Uninstall
View Components
View Dependencies
Package Name Mercury
Language English
Version Name Summer 2013
Namespace Prefix mercury
Publisher Aprika
Description Mercury SMS by Aprika Business Solutions
Installed By Colin Johnson, 3/07/2013 7:11 PM
Version Number 1.0 (Beta 3)
Package Type Managed
API Access Unrestricted [Enable Restrictions]
Modified By Colin Johnson, 3/07/2013 7:11 PM

Congratulations! Your Mercury SMS application has been installed correctly. You are now ready to move on to Configuration.

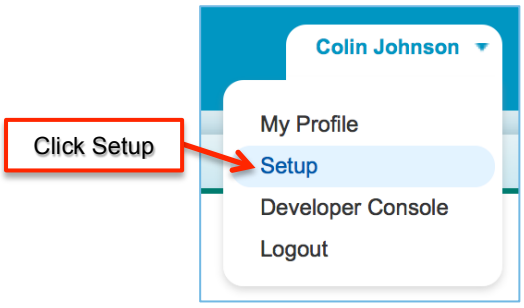
Configuration

Before you can begin using Mercury SMS, there are a few steps required to configure the application to your specific Salesforce.com org.

Configure Force.com Site

To enable the inbound SMS functionality, a Site needs to be configured, which can be done by following the steps below.

To access the setup menu, click **Your Name > Setup**



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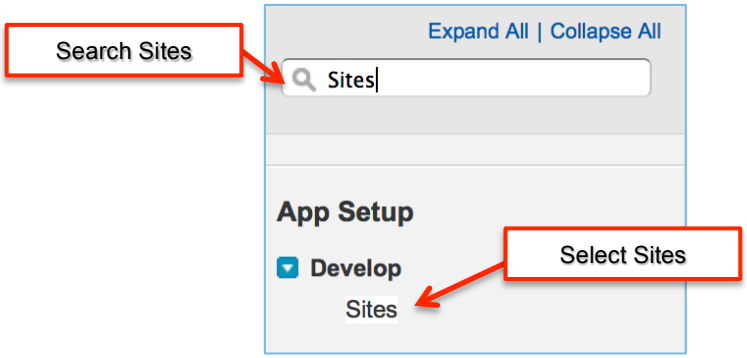
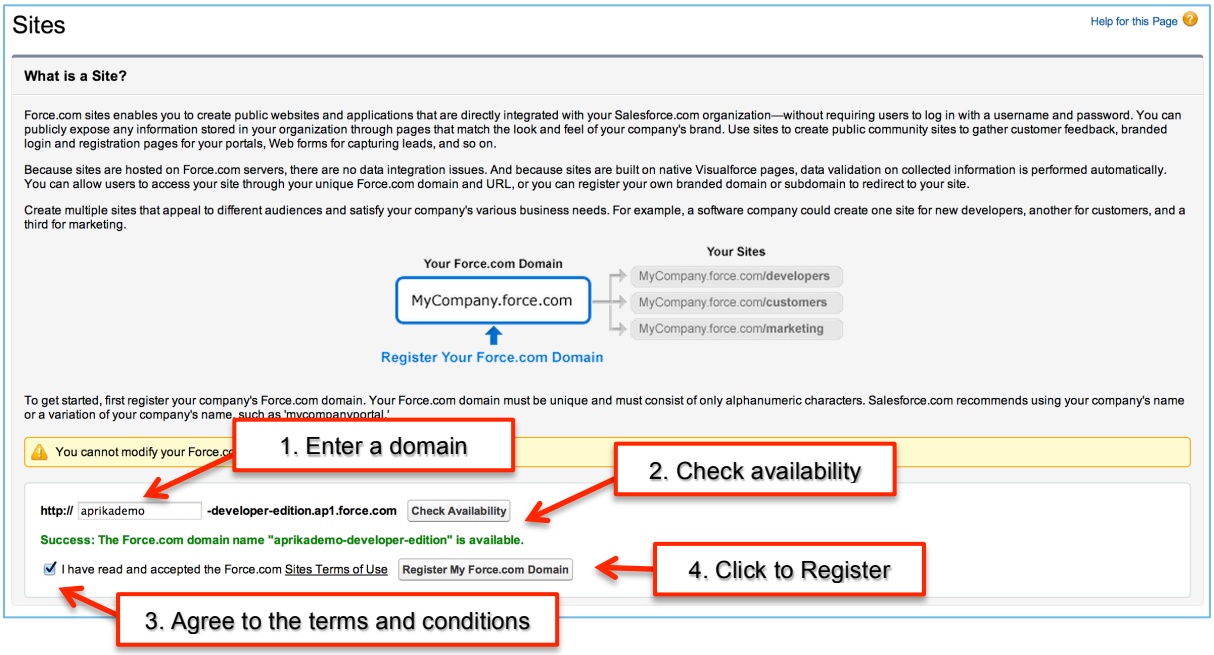
Type ‘Sites’ in the left hand Quick Search box. Then click Sites under the Develop sub heading.



Register a Force.com Domain

Note: This step only applies if you do not already have a force.com Domain.
To register a domain, follow these steps:

- Enter [Your Company Name] in to the text box and click “Check Availability”
- If the Force.com Domain Name is available, select the checkbox and click “Register My Force.com Domain”


Sites
Help for this Page
What is a Site?
Force.com sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.
Because sites are hosted on Force.com servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Force.com domain and URL, or you can register your own branded domain or subdomain to redirect to your site.
Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.
Your Force.com Domain
MyCompany.force.com
Register Your Force.com Domain
Your Sites
MyCompany.force.com/developers
MyCompany.force.com/customers
MyCompany.force.com/marketing
To get started, first register your company's Force.com domain. Your Force.com domain must be unique and must consist of only alphanumeric characters. Salesforce.com recommends using your company's name or a variation of your company's name, such as 'mycompanyportal.'
You cannot modify your Force.com
http:// aprikademo -developer-edition.ap1.force.com Check Availability
Success: The Force.com domain name "aprikademo-developer-edition" is available.
I have read and accepted the Force.com Sites Terms of Use
Register My Force.com Domain
1. Enter a domain
2. Check availability
3. Agree to the terms and conditions
4. Click to Register

Once you have a registered domain, you can create a new site.

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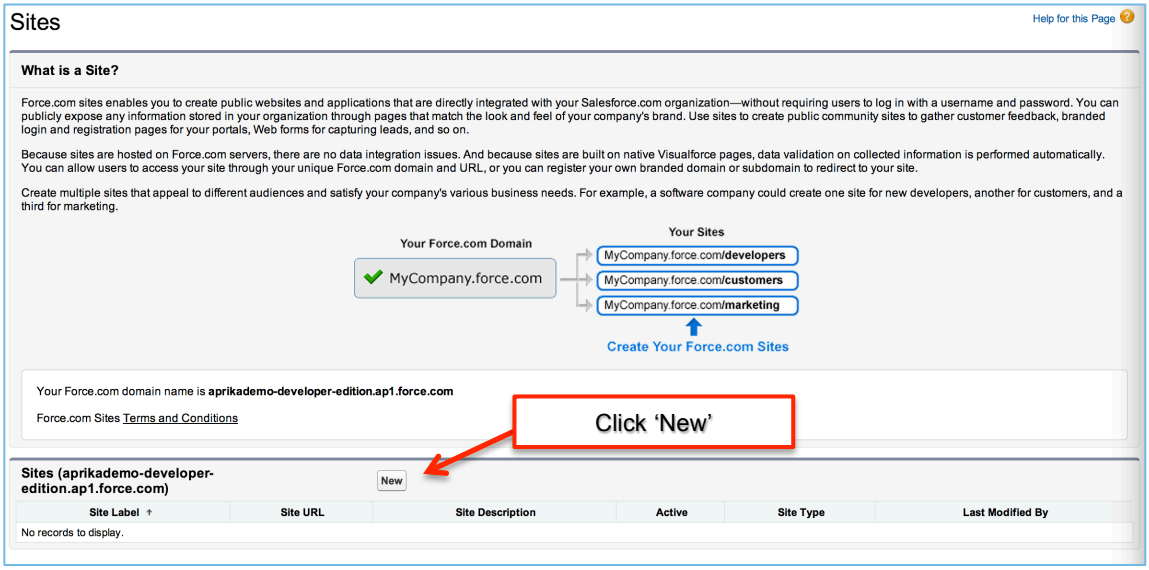
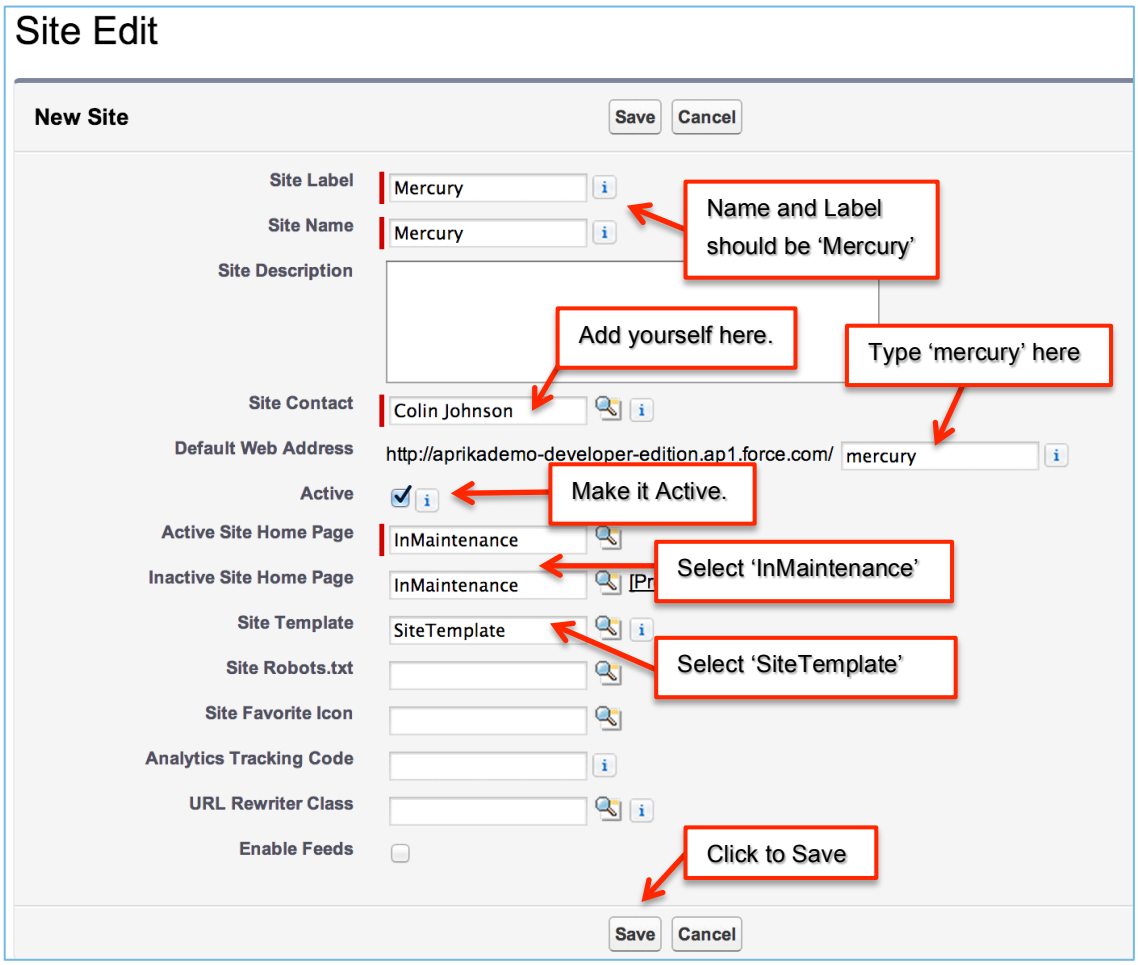
Create a Site

Click the 'New' button to create a new site.


Sites
Help for this Page
What is a Site?
Force.com sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.
Because sites are hosted on Force.com servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Force.com domain and URL, or you can register your own branded domain or subdomain to redirect to your site.
Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.
Your Force.com Domain
MyCompany.force.com
Your Sites
MyCompany.force.com/developers
MyCompany.force.com/customers
MyCompany.force.com/marketing
Create Your Force.com Sites
Your Force.com domain name is aprikademo-developer-edition.ap1.force.com
Force.com Sites Terms and Conditions
Click 'New'
Sites (aprikademo-developer-edition.ap1.force.com)
New
Site Label
Site URL
Site Description
Active
Site Type
Last Modified By
No records to display.

Configure your Site **EXACTLY** as shown below and click "Save"



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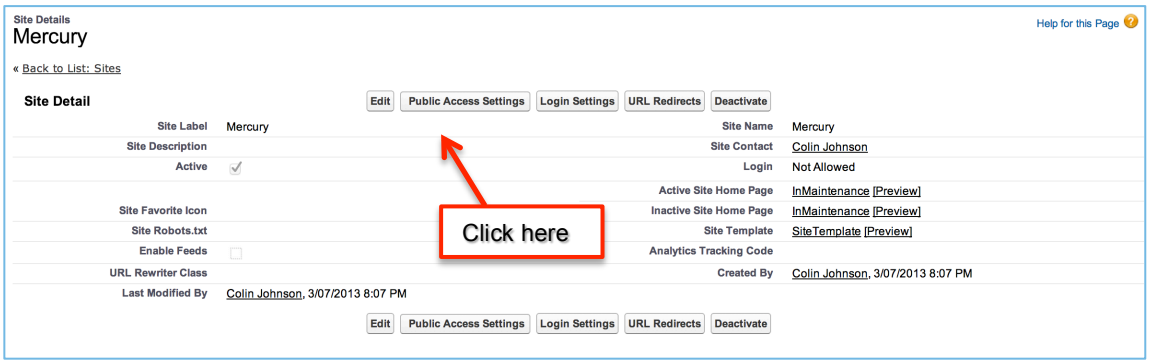
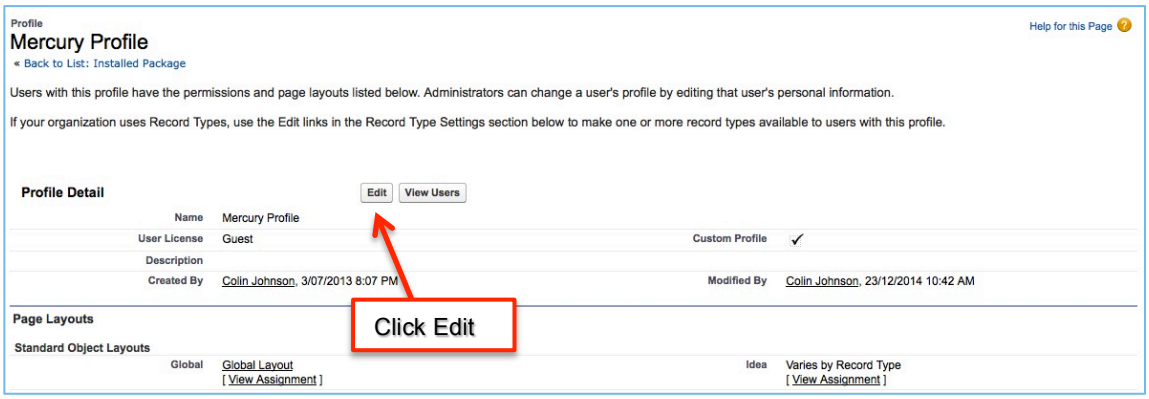
Grant the Site Access to the Relevant Objects and Fields

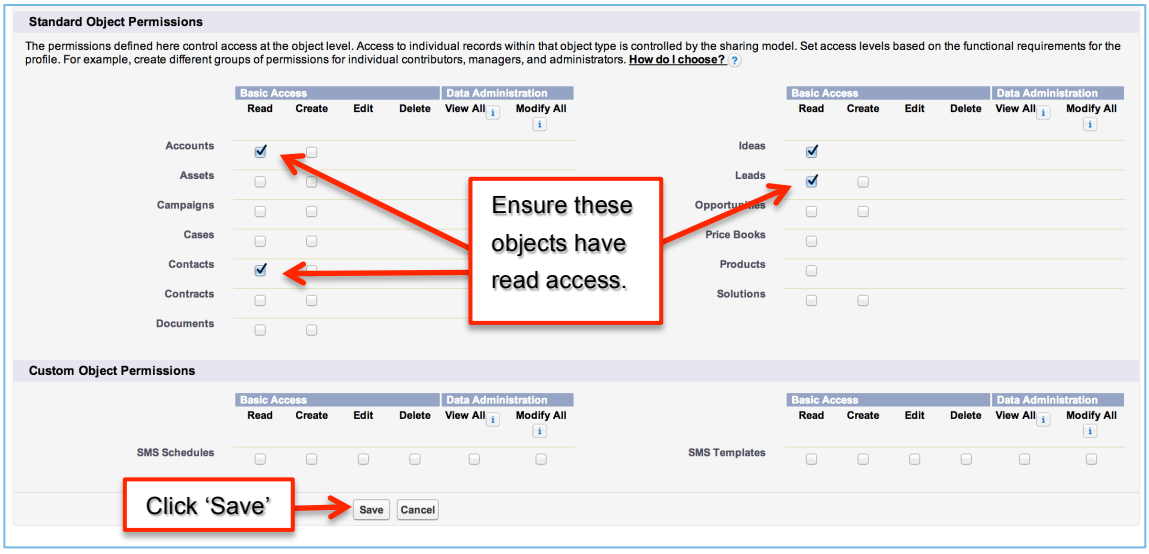
Click on Public Access Settings



On the next screen, click “Edit”


Profile
Mercury Profile
Help for this Page
« Back to List: Installed Package
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
Profile Detail
Edit
View Users
Name
Mercury Profile
User License
Guest
Description
Created By
Colin Johnson, 3/07/2013 8:07 PM
Custom Profile
Modified By
Colin Johnson, 23/12/2014 10:42 AM
Page Layouts
Standard Object Layouts
Global
Global Layout
[View Assignment]
Idea
Varies by Record Type
[View Assignment]
Click Edit

Ensure the profile has Read access to the Account, Contact and Leads Objects in the Standard Object Permissions section, then click “Save”.



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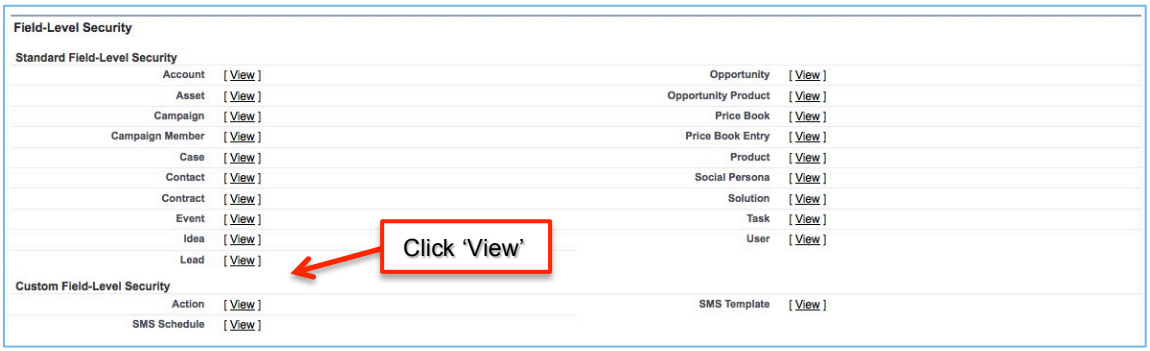
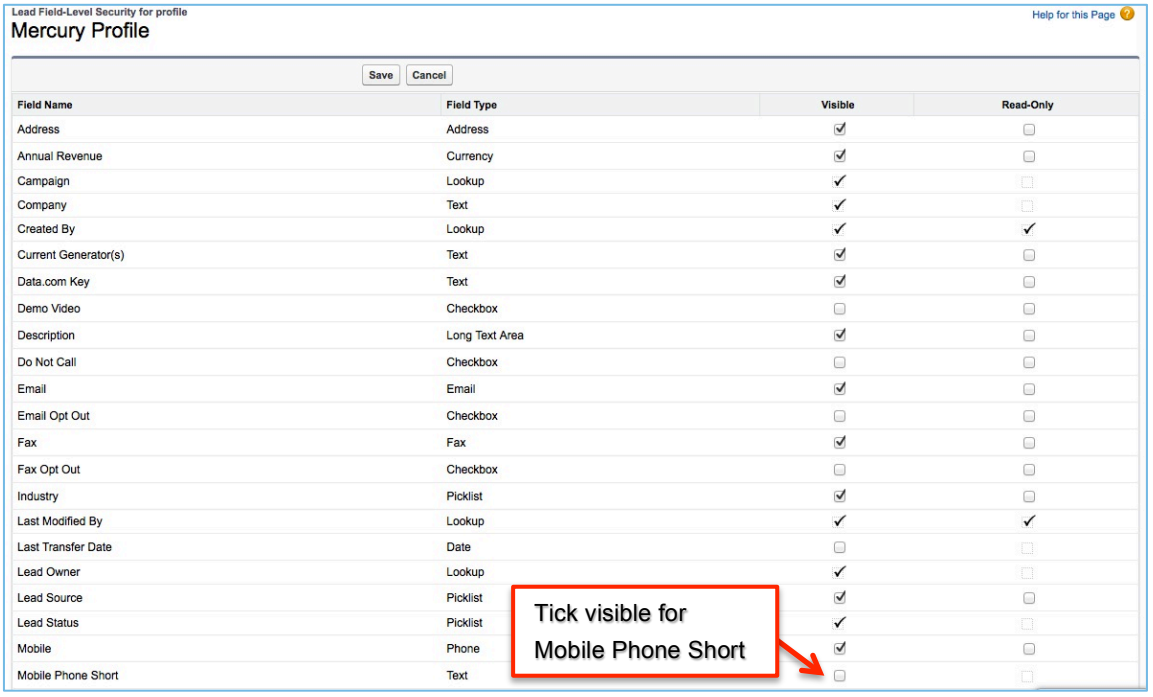
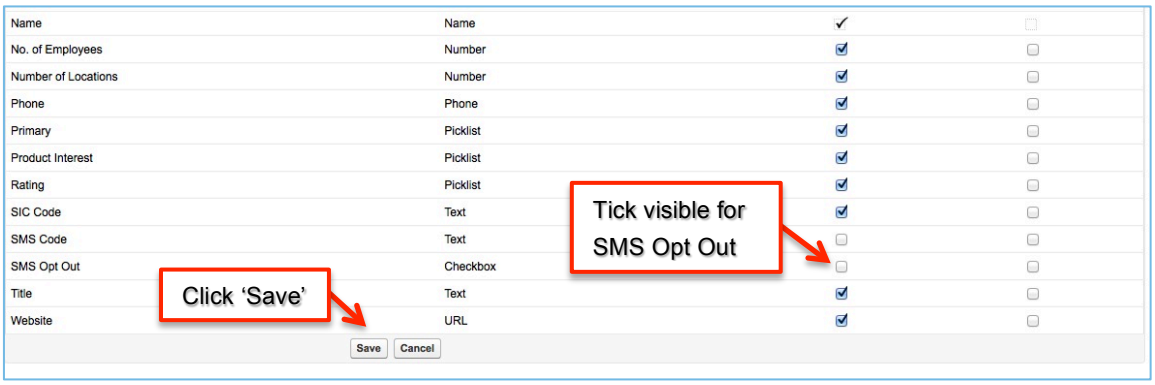
Next, scroll to the Field-Level Security section and click “View” next to Leads.


Field-Level Security
Standard Field-Level Security
Account [View]
Asset [View]
Campaign [View]
Campaign Member [View]
Case [View]
Contact [View]
Contract [View]
Event [View]
Idea [View]
Lead [View]
Opportunity [View]
Opportunity Product [View]
Price Book [View]
Price Book Entry [View]
Product [View]
Social Persona [View]
Solution [View]
Task [View]
User [View]
Click ‘View’
Custom Field-Level Security
Action [View]
SMS Schedule [View]
SMS Template [View]

Now click edit and then mark the ‘Mobile Phone Short’ and ‘SMS Opt Out’ fields as visible then Save.





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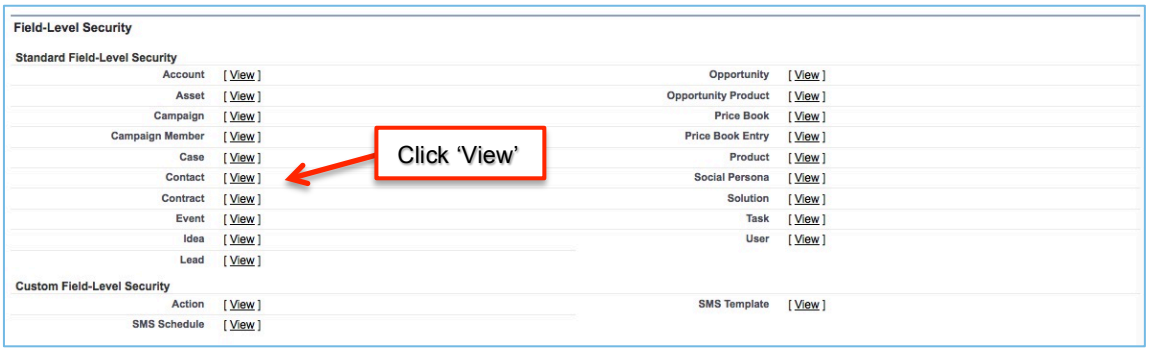
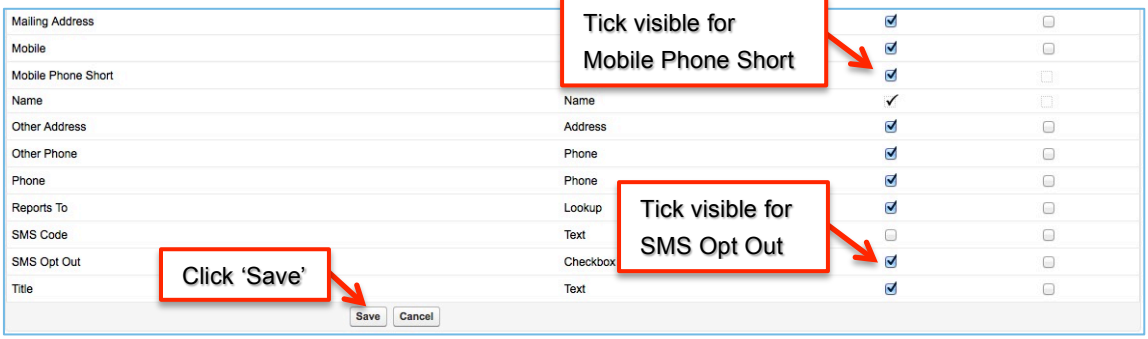
Now, you need to do the same for Contacts.
Click “View” next to Contacts in the Field-Level Security section.

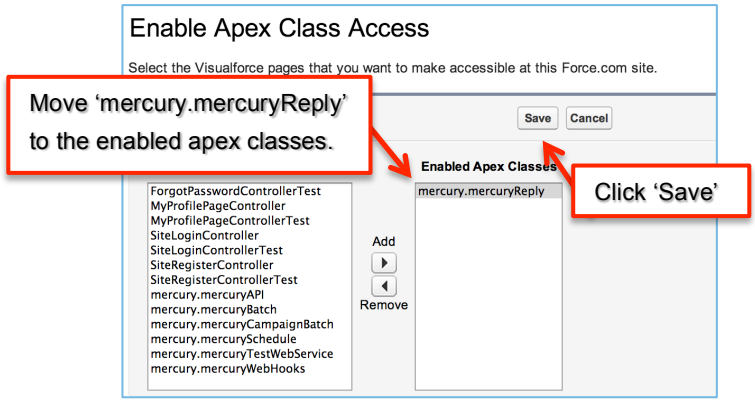

Field-Level Security
Standard Field-Level Security
Account [View]
Asset [View]
Campaign [View]
Campaign Member [View]
Case [View]
Contact [View]
Contract [View]
Event [View]
Idea [View]
Lead [View]
Opportunity [View]
Opportunity Product [View]
Price Book [View]
Price Book Entry [View]
Product [View]
Social Persona [View]
Solution [View]
Task [View]
User [View]
Custom Field-Level Security
Action [View]
SMS Schedule [View]
SMS Template [View]
Click ‘View’

Click edit and then mark the ‘Mobile Phone Short’ and ‘SMS Opt Out’ fields as visible then Save.



Next, you need to scroll down to the “Enabled Apex Class Access” related list and click “Edit”

Select ‘mercury.mercuryReply’ from the list of Available Apex Classes and move it across to the Enabled Apex Classes column, then click “Save”



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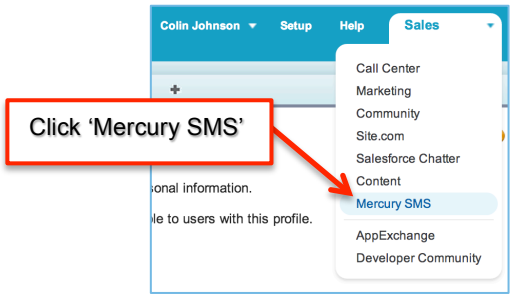
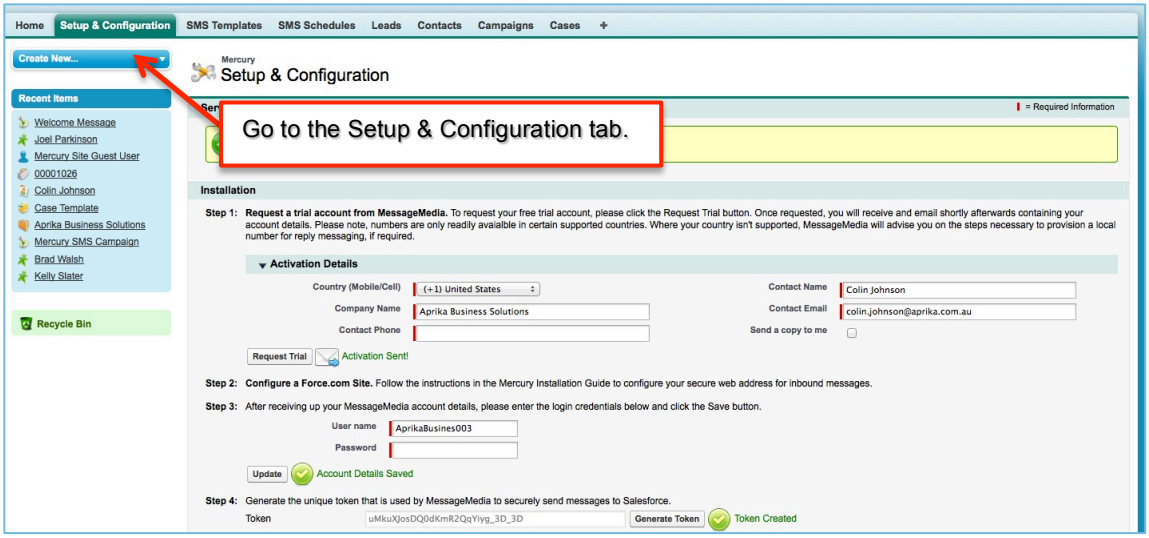
You can now go to the Mercury SMS app to complete the remaining steps.



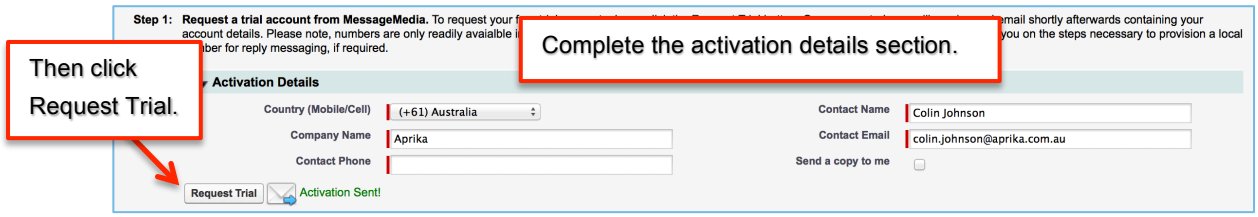
Now, go to the Setup & Configuration tab and follow the steps as listed below:


Home
Setup & Configuration
SMS Templates
SMS Schedules
Leads
Contacts
Campaigns
Cases
Create New...
Recent Items
Welcome Message
Joel Parkinson
Mercury Site Guest User
00001026
Colin Johnson
Case Template
Aprika Business Solutions
Mercury SMS Campaign
Brad Walsh
Kelly Slater
Recycle Bin
Mercury
Setup & Configuration
Go to the Setup & Configuration tab.
= Required Information
Installation
Step 1: Request a trial account from MessageMedia. To request your free trial account, please click the Request Trial button. Once requested, you will receive and email shortly afterwards containing your account details. Please note, numbers are only readily avaialble in certain supported countries. Where your country isn't supported, MessageMedia will advise you on the steps necessary to provision a local number for reply messaging, if required.
Activation Details
Country (Mobile/Cell)
(+1) United States
Company Name
Aprika Business Solutions
Contact Phone
Contact Name
Colin Johnson
Contact Email
colin.johnson@aprika.com.au
Send a copy to me
Request Trial
Activation Sent!
Step 2: Configure a Force.com Site. Follow the instructions in the Mercury Installation Guide to configure your secure web address for inbound messages.
Step 3: After receiving up your MessageMedia account details, please enter the login credentials below and click the Save button.
User name
AprikaBusines003
Password
Update
Account Details Saved
Step 4: Generate the unique token that is used by MessageMedia to securely send messages to Salesforce.
Token
uMkuXJosDQ0dKmR2QqYiyg_3D_3D
Generate Token
Token Created

Step 1 – Request your MessageMedia trial account.

In order to request your MessageMedia trial account, complete the 'Activation Details' as follows:

Country (Mobile/Cell) – select the Country you would like your messages to be sent from
Company Name – if different from that already selected
Contact Name – if different from that already selected
Contact Email – if different from that already selected
Check "Send a copy to me" to be cc'd on the email
Click the "Request Trial" button



The 'Activation Sent' icon will appear.

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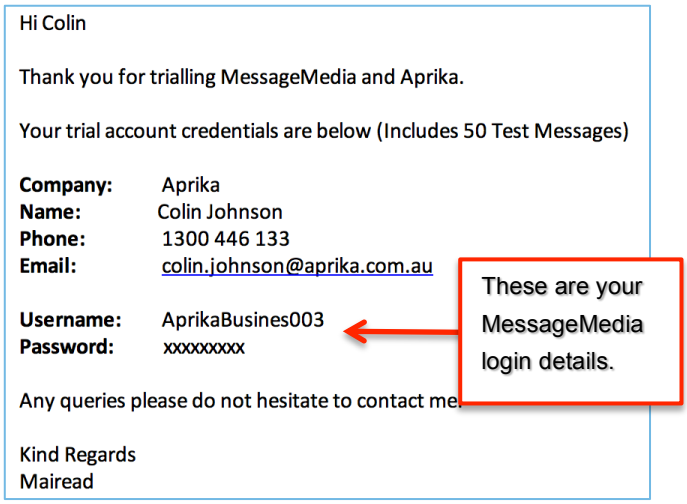
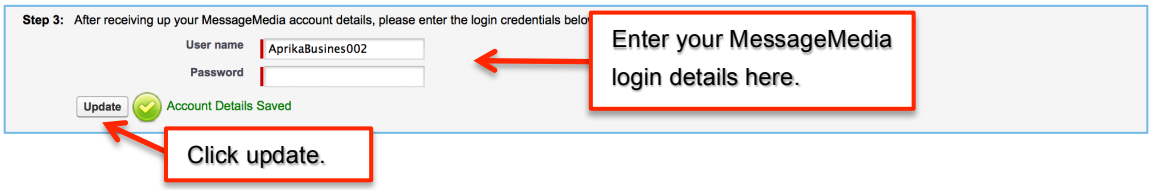
You will shortly receive your account details via email from MessageMedia, the email will look similar to the following example:


Hi Colin
Thank you for trialling MessageMedia and Aprika.
Your trial account credentials are below (Includes 50 Test Messages)
Company: Aprika
Name: Colin Johnson
Phone: 1300 446 133
Email: colin.johnson@aprika.com.au
Username: AprikaBusines003
Password: xxxxxxxxx
Any queries please do not hesitate to contact me
Kind Regards
Mairead
These are your MessageMedia login details.

Note: if you have already configured the Site as outlined in the instructions above, you can now proceed straight to Step 3. If you have not yet configured the Site, please refer to the 'Configure Force.com Site' section on Page 8.

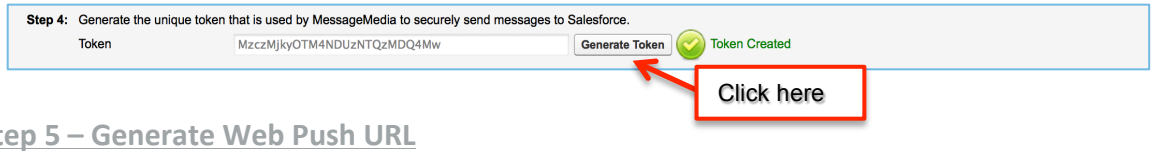
Step 3 – Enter your MessageMedia Login Details.

Enter your User name and Password and click "Save".
The 'Account Details Saved' icon should appear.



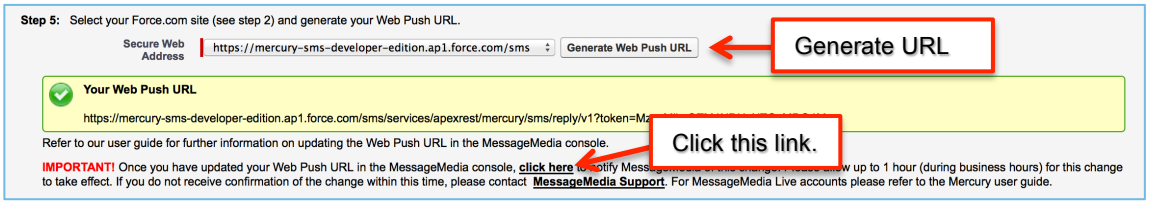
Step 4 – Generate a Token

Click the "Generate Token" button.
The Token will appear in the text box and the 'Token Created' icon will appear.


Step 4: Generate the unique token that is used by MessageMedia to securely send messages to Salesforce.
Token
MzczMjkyOTM4NDUzNTQzMDQ4Mw
Generate Token
Token Created
Click here

Step 5 – Generate Web Push URL

You are now ready to generate your Web Push URL that will be used by MessageMedia to process inbound messages. Select the Secure Web Address, this should be the Mercury Site previously configured and then click the 'Generate Web Push URL' button, your URL will be displayed. It is recommended that you copy this now for use in a later step. Be sure to notify MessageMedia of this change by clicking on the 'Click Here' link.


Step 5: Select your Force.com site (see step 2) and generate your Web Push URL.
Secure Web Address
https://mercury-sms-developer-edition.ap1.force.com/sms
Generate Web Push URL
Generate URL
Your Web Push URL
Refer to our user guide for further information on updating the Web Push URL in the MessageMedia console.
Click this link.
IMPORTANT! Once you have updated your Web Push URL in the MessageMedia console, click here
MessageMedia Support. For MessageMedia Live accounts please refer to the Mercury user guide.

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You are now Ready to set up your MessageMedia Trial Account.

Trial Account Setup

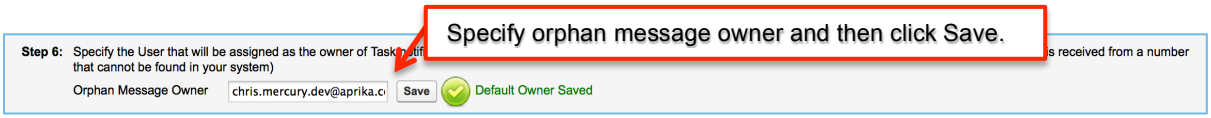
- Go to www.message-media.com
- Click Sign In
- Enter your MessageMedia User Name and Password (you would have received this following successful completion of Step 1 above)
- Click 'Create a new broadcast'
- Set the 'Internal Tracking Name' as Token
- Paste your Web Push URL into the 'Message' box
- Click 'Save as template'
- Click Logout
- Return to the Mercury SMS Setup & Configuration page and click the 'click here' (as shown on the screenshot above) link to notify MessageMedia you have completed this setup process

Live Account Setup

1. Go to www.message-media.com
2. Click Sign In
3. Enter your MessageMedia User Name and Password (you would have received this following successful completion of Step 1 above)
4. Click 'Settings' on the Account you need to update
5. Click the 'Reply Settings' Tab
6. Paste your Web Push URL into the 'Inbound message processing URL' field
7. Click Update
8. Click Close
9. Click Logout

Step 6 – Specify an Orphan Message Owner

Type in the name of the User that will be the Orphan Message Owner (Note, as you begin to type a User's name, a list of possible Users will appear) and then click "Save".



Step 7 – Adjust Page Layouts

Add the Custom Button and SMS Opt Out Field to the page layouts as per the table below:

Object	Components to add
Lead	Custom Button: Send SMS Custom Field: SMS Opt Out
Contact	Custom Button: Send SMS Custom Field: SMS Opt Out
Case	Custom Button: Send SMS
Campaign	Custom Button: Send Bulk SMS
Campaign Member	Custom Button: Send SMS

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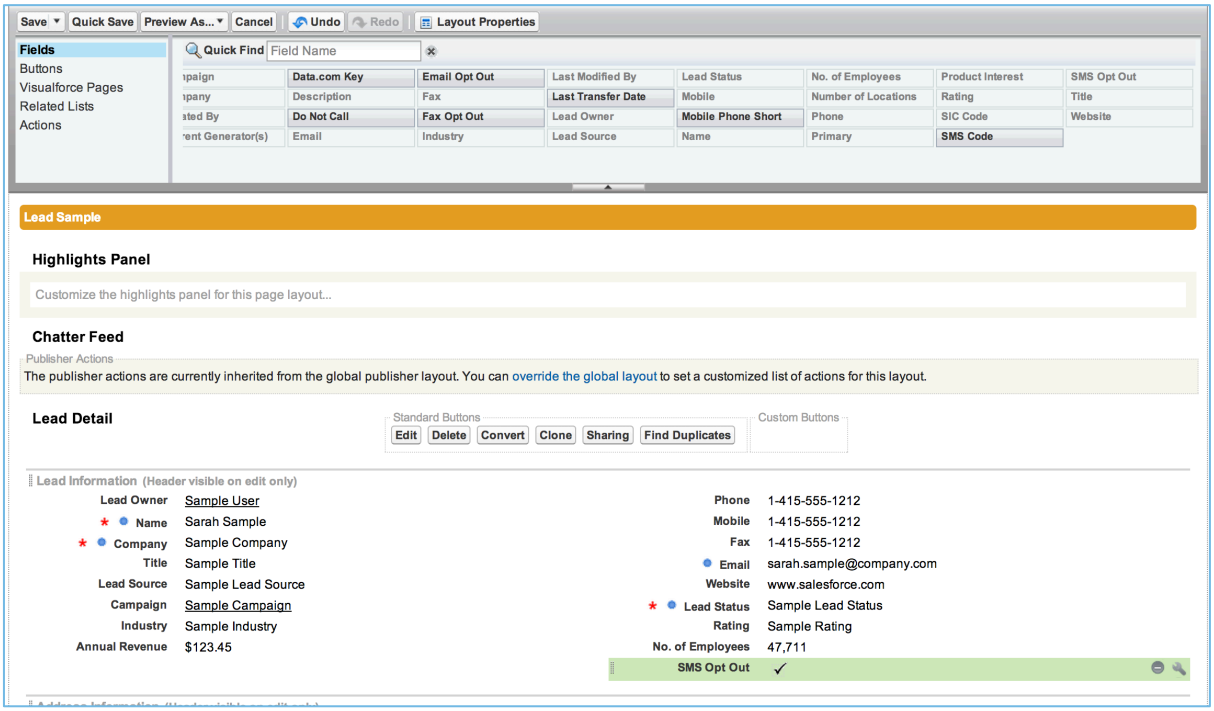
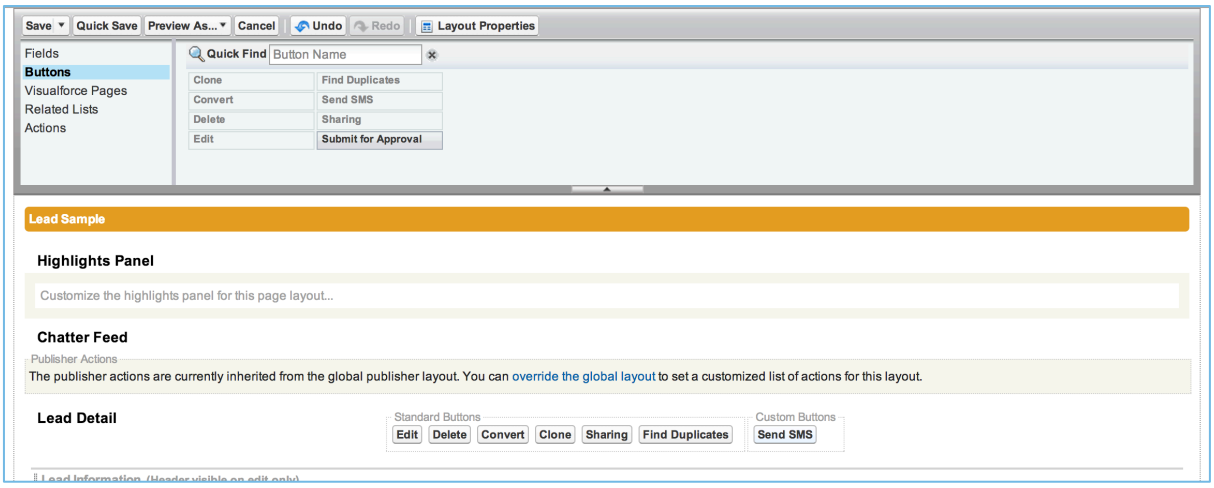
Below are the instructions on how to add the Custom Button and the Custom Field to the Lead Object. The same process should be followed for the other Objects.

Click Your Name > Setup > Customise > Leads > Page Layouts > Edit

In Fields drag ‘SMS Opt Out’ on to the page layout



In Buttons drag ‘Send SMS’ on to the page layout



Click “Save”

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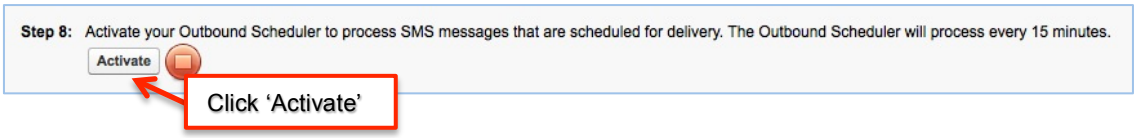
Once you have completed this action for all of the required Objects, return to the Mercury SMS Setup & Configuration Tab.

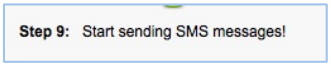
Step 8 – Activate the outbound scheduler

Click "Activate" to enable the Outbound Scheduler. The icon will appear indicating Mercury SMS is now active.


Step 8: Activate your Outbound Scheduler to process SMS messages that are scheduled for delivery. The Outbound Scheduler will process every 15 minutes.
Activate
Click 'Activate'

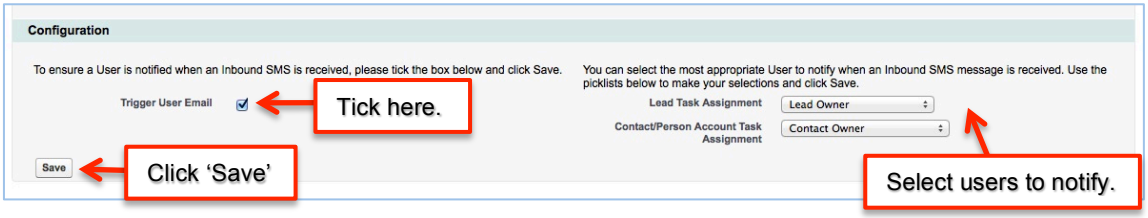
Step 9 – Congratulations!

You are now ready to start using Mercury SMS.



Inbound SMS Notification

You can also configure notification emails to be sent when inbound SMS messages are received. To do this, go to the Setup & Configuration tab and scroll down to the configuration section.
From here make sure to tick the "Trigger User Email" checkbox and select the user to notify for Lead and Contact/Person Account messages then click the "Save" button.


Configuration
To ensure a User is notified when an Inbound SMS is received, please tick the box below and click Save.
Trigger User Email
Tick here.
Save
Click 'Save'
You can select the most appropriate User to notify when an Inbound SMS message is received. Use the picklists below to make your selections and click Save.
Lead Task Assignment
Lead Owner
Contact/Person Account Task Assignment
Contact Owner
Select users to notify.

The users you can choose to notify are as follows:

- Owner – The User who is the Lead / Contact / Person Account Owner will be notified of the inbound SMS
- Last Modified By – The User who last modified the Lead / Contact / Person Account will be notified of the inbound SMS
- Last Message Sent – The User who sent the most recent outbound SMS to the Lead / Contact / Person Account will be notified of the inbound SMS

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Using Mercury SMS

The remaining sections of this user guide provide instructions on how to use the various features.

Outbound SMS

When sending outbound messages from Mercury SMS there are several options to choose from, which include:

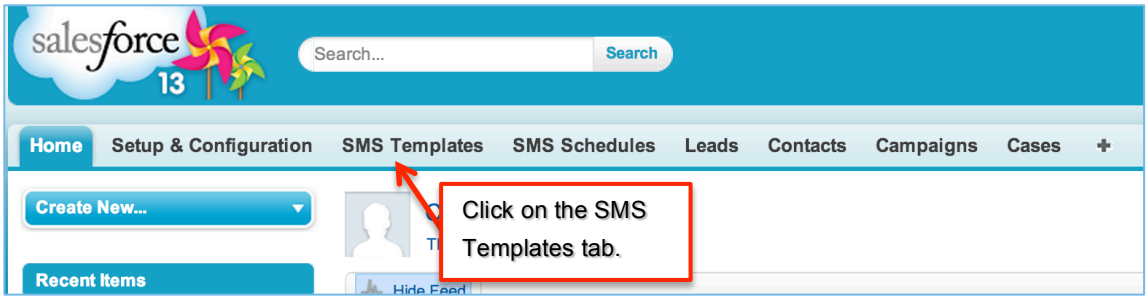
- Send a message to an individual
- Send a message to a list of Campaign Members
- Create an ad-hoc message
- Select an SMS Template message
- Send the SMS message immediately
- Schedule the SMS message to be sent at a later date/time
- Execute a Workflow Rule to send an SMS Template message to an individual

All outbound SMS messages, whether ad-hoc or SMS Template, support merge fields. A message can merge fields in from the object record, owner or sending user. Instructions on how to use each of the features are provided below.

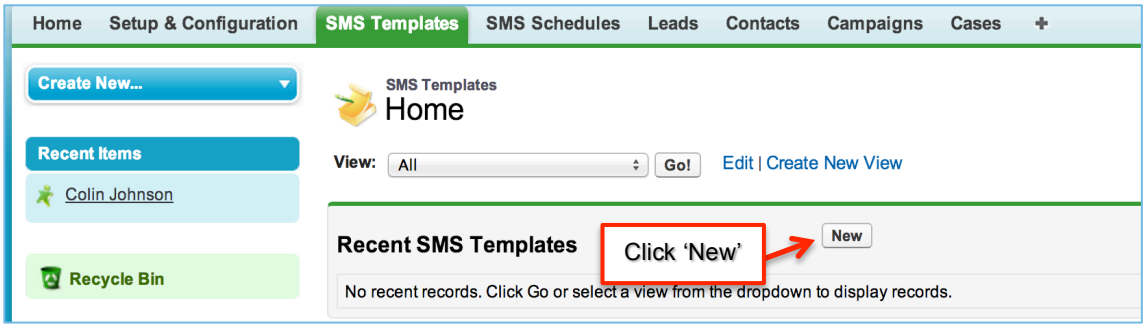
When an outbound SMS message is sent, an Activity History record is created with a Subject of "SMS: Sent" and the Description field will contain the actual SMS message.

Creating an SMS Template

To create an SMS Template, first click on the SMS Template Tab



Now, click on the "New" button to create a new SMS Template record



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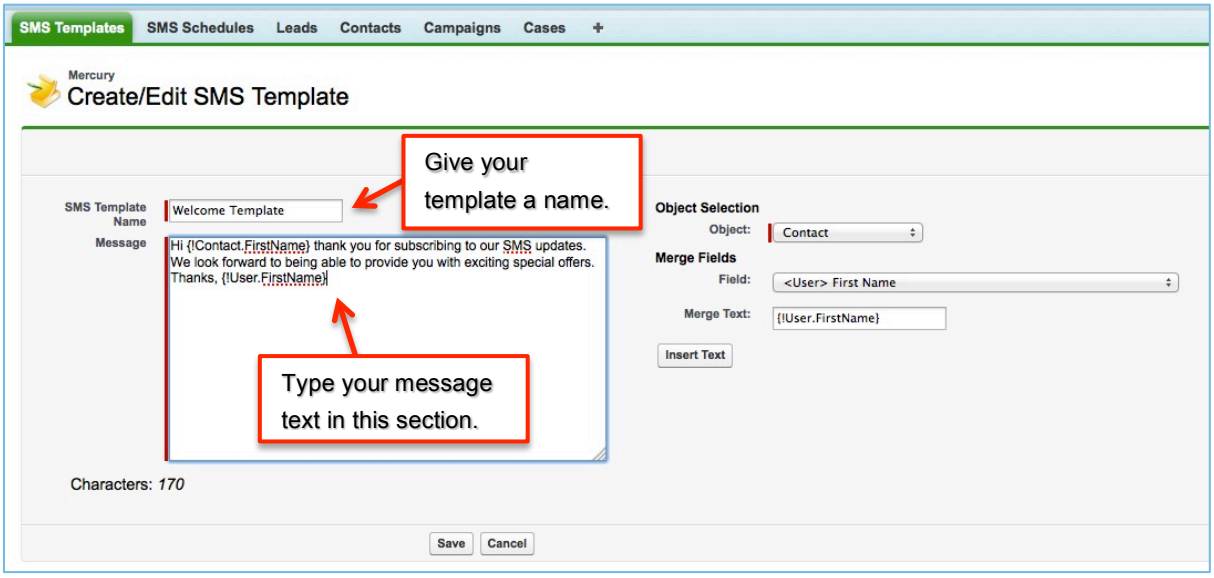
Enter the SMS Template Name and Message, using merge fields if you wish.

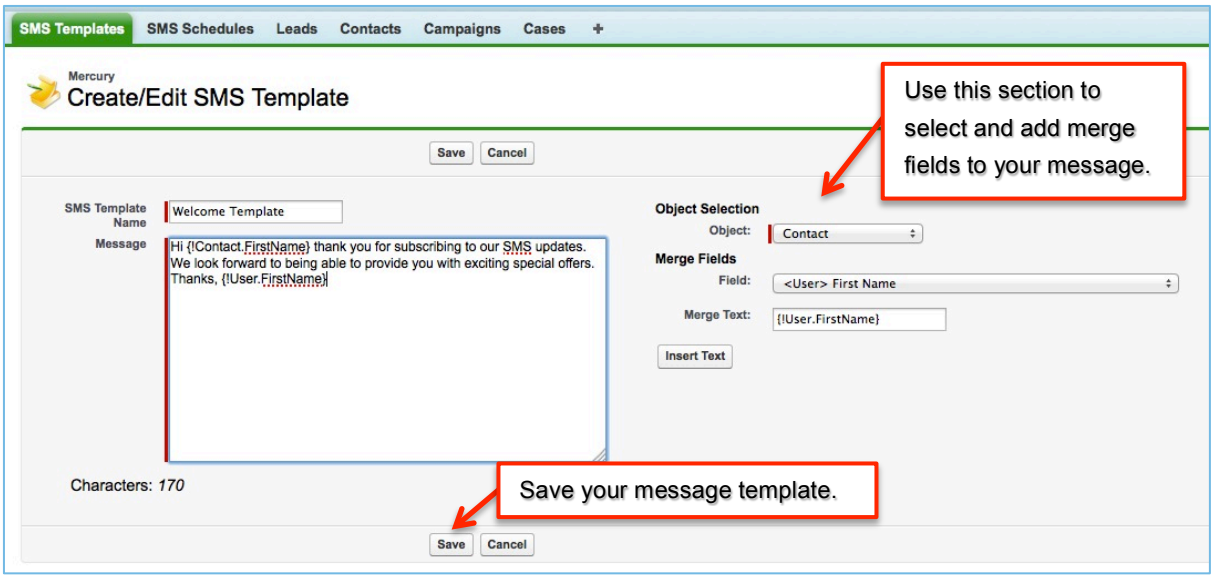


Note: If you wish to add merge fields to an SMS Template, you need to follow the steps below:

1. Select the Object. This is the Object that the template will work for. You need to create specific templates for each Object you wish to send SMS from. Selecting an Object automatically generates the fields that are available for merge for that Object.

2. Select the Field
3. Click the "Insert Text" button

This will merge the correct merge field code into the Message text box.
Once the SMS Template is complete, click "Save"



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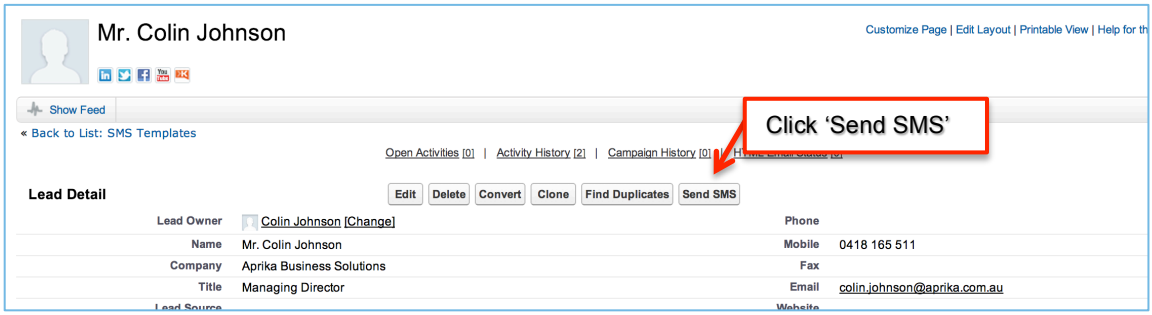
Sending an Individual SMS Message

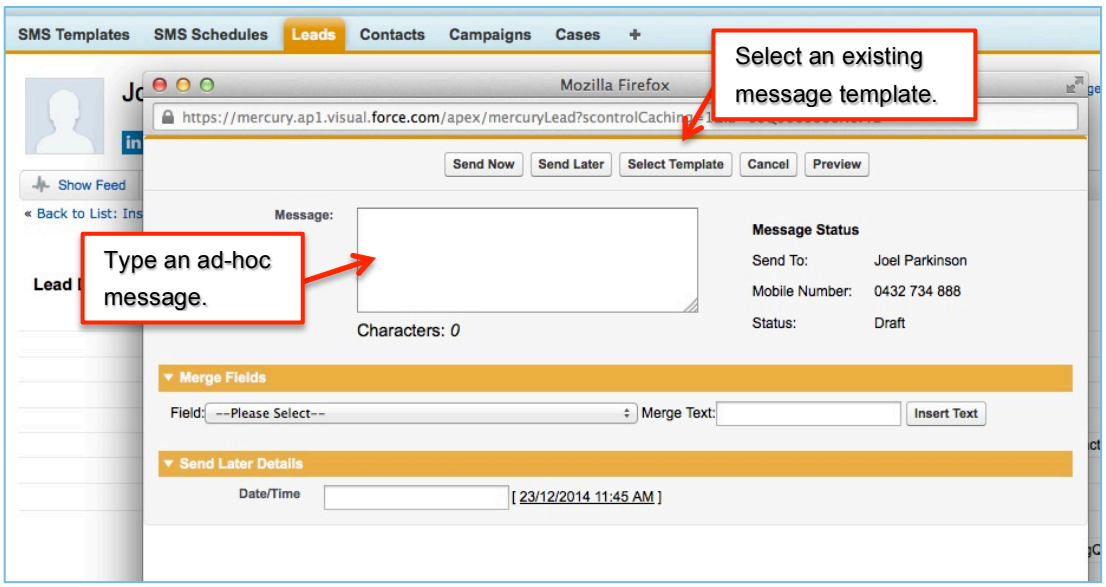
Mercury SMS provides the ability to send an SMS to an individual, including:

- Lead
- Contact
- Person Account
- Campaign Member
- Case (Contact associated to the Case)

To send an SMS message to an individual, click on the "Send SMS" button on the detail page for the record.



This will open up a new browser window that will let you create an ad-hoc message or select an SMS Template from the library.



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Create an ad-hoc message

Type the text directly into the “Message” field

Note: If you wish to add merge fields to an SMS Template, you need to follow the steps below:

- Select the Field
- Click the “Insert Text” button

This will merge the correct merge field code into the Message text box.

Select an SMS Template message

Click the “Select Template” button
Click the “Name” link of the message you wish to use

This will populate the SMS Template text into the “Message” field

The message is now ready to be sent. You can choose to either send it straight away or to schedule it for delivery at a later date / time.

Send Now

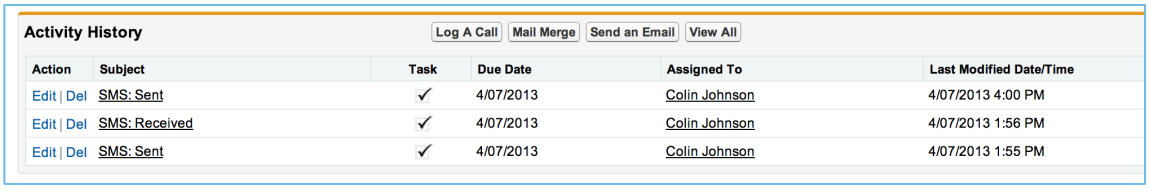
Click the “Send Now” button
Click “OK” to confirm you wish to send the message

Send Later

Enter a date and time in the “Date/Time” field
Click the “Send Later” button
Click “OK” to confirm you wish to schedule the message to be sent later

Once you have confirmed the message is ready to be sent, a “Success” message will appear at the top of the page. At this point, you can choose to click the “Send Another” button or close the window, returning you to the detail page of the record.

All SMS messages sent or received via Mercury SMS will appear in the “Activity History” related list.



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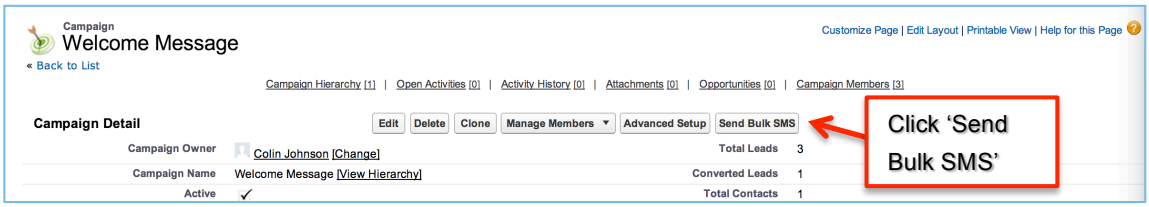
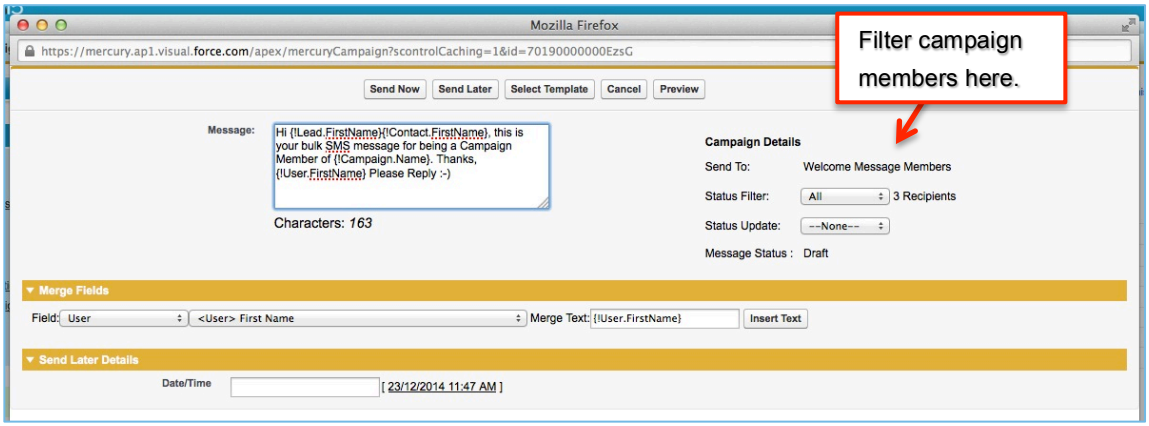
Sending a Bulk SMS Message

Mercury SMS provides the ability to send a 'bulk' message to a list of Campaign Members. To send a bulk SMS message to Campaign Members, click the "Send Bulk SMS" button on the detail page of the Campaign.



The same options are available as for sending an SMS message to an individual. You can create an ad-hoc message or select from the SMS Template library.

You can also choose to only send the SMS message to Campaign Members with a particular Status. In addition, you can choose to update the Status of for recipient Campaign Members.



Note: If you would like to use merge fields on an SMS message to Campaign Members comprising of both Leads and Contacts, you will need to include both the Lead and the Contact merge field. For example, to include the First Name value, you will need to insert both values e.g. {!Lead.FirstName}{!Contact.FirstName}.

Sending an SMS via a Workflow Rule

Mercury SMS can send SMS Template messages via a Workflow Rule. To send an SMS Template message via a workflow rule, you will need to follow the steps below.

Create a Workflow Rule

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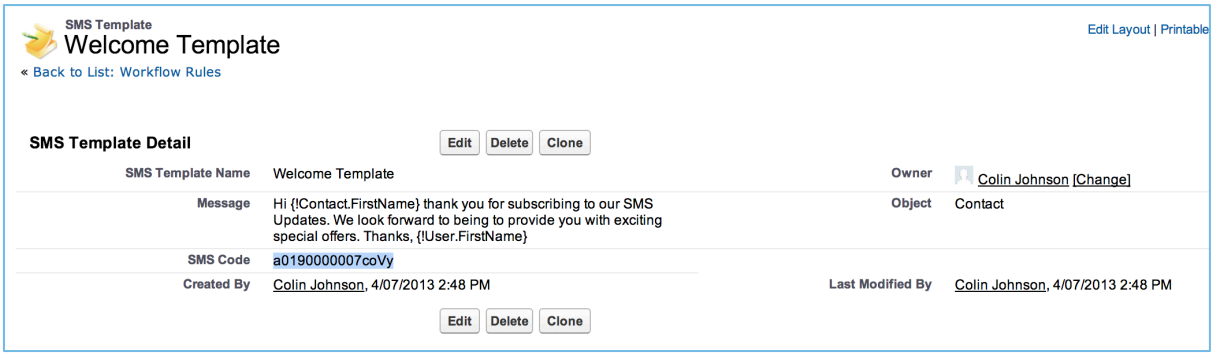
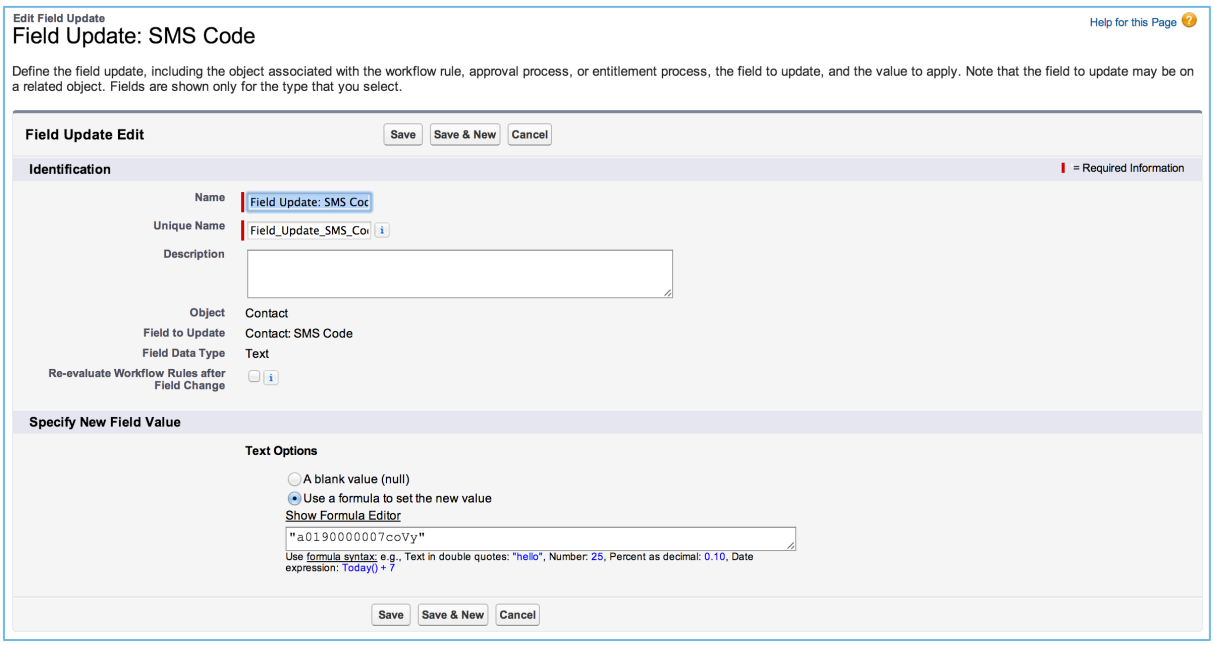
Create a Field Update Workflow Action, which performs a field update on the “SMS Code” field on the Object (Lead or Contact). The value the field should be updated with needs to be the Record ID of the SMS Template record you wish to send. To access this value, go to the detail page of the SMS Template record where you can copy and paste the value from the “SMS Code” field.



Note: The Record ID should be inserted into Formula Field section of the Field Update rule in double quotes e.g. “a0190000007coVy” see the below screenshot for reference.


Edit Field Update
Field Update: SMS Code
Help for this Page
Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.
Field Update Edit
Save
Save & New
Cancel
Identification
= Required Information
Name
Field Update: SMS Coc
Unique Name
Field_Update_SMS_Co
Description
Object
Contact
Field to Update
Contact: SMS Code
Field Data Type
Text
Re-evaluate Workflow Rules after Field Change
Specify New Field Value
Text Options
A blank value (null)
Use a formula to set the new value
Show Formula Editor
"a0190000007coVy"
Use formula syntax: e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7
Save
Save & New
Cancel

Message Character Length & Credits

There is no hard limit on the number of characters you can send within your message, however we recommend keeping your messages short to avoid using too many SMS credits per message. Each message credit gives you up to 160 characters. So if you were sending a message with 200 characters for example, this would cost 2 message credits. The number of characters being used in your message is displayed underneath the message area as follows:

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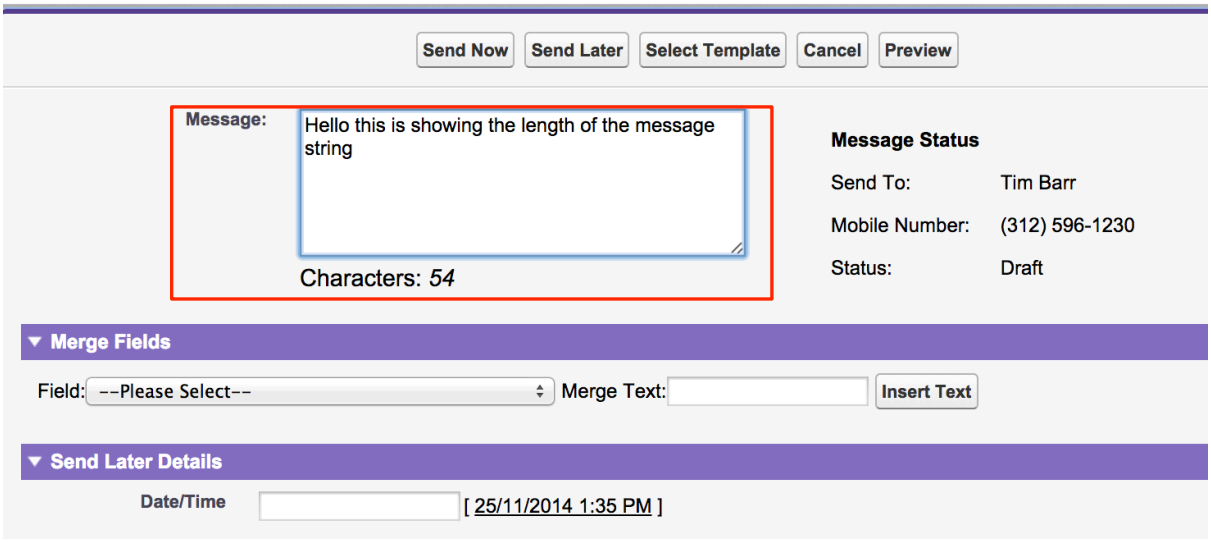

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Inbound SMS

Mercury SMS provides inbound message capability. This means a Lead or Contact can reply to a message they received and it will be inserted as an "Activity History" record relating to their record.

Note: where there are multiple records containing the same Mobile number, an Activity History records will be created for each record.

Receiving Inbound SMS Messages

When an inbound SMS message is received, an Activity History record is created with a Subject of "SMS: Received" and the Description field will contain the actual SMS message. An email notification will also be sent to the designated user if the 'Trigger User Email' setting has been configured.

Receiving Opt-Out Requests

If a Lead or Contact no longer wishes to receive SMS messages, they can unsubscribe by sending a message with the word STOP. This will automatically set the "SMS Opt Out" field for the record to TRUE.

Note: If the "SMS Opt Out" field is set to TRUE, no outbound SMS messages can be sent to that Lead or Contact.

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Contact Information

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Australia

Tel: 1300 446 133
Web: www.aprika.com.au

Technical Support

Mon-Fri: 8.30am - 5.30pm (AEST)
Email: support@aprika.com.au

Sales

Email: enquiries@aprika.com.au

Social Media Forums

www.aprika.com.au/twitter
www.aprika.com.au/facebook
www.aprika.com.au/linkedin
www.aprika.com.au/blog

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